STATE OF NORTH DAKOTA

INTRODUCTION TO
PEOPLESOFT NAVIGATION

VERSION 8.3

DISCLAIMER

Written by MAXIMUS-*ERP Solutions Group*, March 2003.

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WORKING WITH BROWSER-BASED APPLICATIONS

OVERVIEW

This section describes the basics for accessing and using PeopleSoft Human Resources Management System Version 8.3.

OBJECTIVES

After completing this section, you will be able to:

1. Understand PeopleSoft 8.3 terminology.
2. Understand how to log into and navigate through your PeopleSoft application.

Overview and Applications

PeopleSoft is a table-driven database application designed to meet each organization's business processing and information needs. Sorting information into tables ensures data integrity and minimizes data redundancy. The tables are then organized into a relational database.

PeopleSoft is designed to integrate all Human Resource, Benefits, Payroll and Time & Labor applications. That is, the applications share the same relational data structure, data tables, user interfaces, reporting tools, and customization capabilities. PeopleSoft pages also display the same familiar table-driven and effective date-driven designs throughout its applications.

PeopleSoft offers a compliment of applications that cover most human resources needs. PeopleSoft Education and Government Human Resource Management System consists of the following applications (modules):

- Human Resources
- Base Benefits
- Payroll

The State of North Dakota has also purchased the PeopleSoft Time and Labor module.

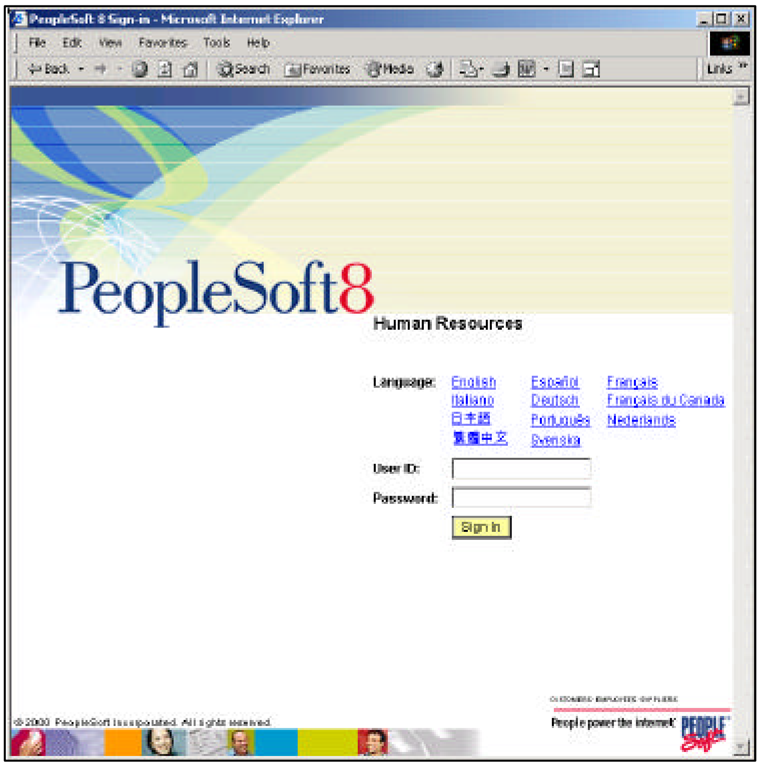
Browser Based Applications

In PeopleSoft Version 8.3, applications are in a purely internet environment. This new environment is called PeopleSoft Internet Architecture (PIA). PeopleSoft Internet Architecture is a server-centric architecture that requires the installation of only a web browser on individual user machines and you access PeopleSoft applications by logging into a standard web browser as you would if you wanted to open your favorite website.

SIGNING INTO YOUR SYSTEM

1. **Open** your Internet web browser – Explorer.
2. Enter http://www.discovernd.com/connectnd.html in the URL address box.
3. Press "enter."
4. Click on "PeopleSoft 8.30 Training."

The PeopleSoft sign-in page will appear:



5. Enter your **User ID** and **Password.**

Your User ID and Password are case sensitive. Passwords always appear as asterisks in the display as you type them. For your specific User ID and Password refer to your classroom instructor.

6. Click on the **Sign In** button. 

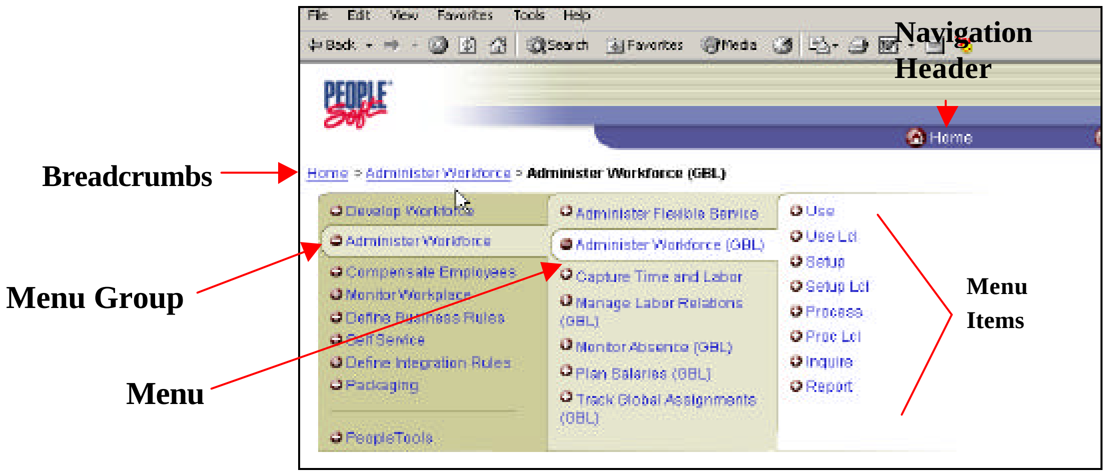
The PeopleSoft online system will validate your User ID and Password. If, one is invalid, the system will display an error message below the Sign

In button. You'll need to reenter both the User ID and Password.

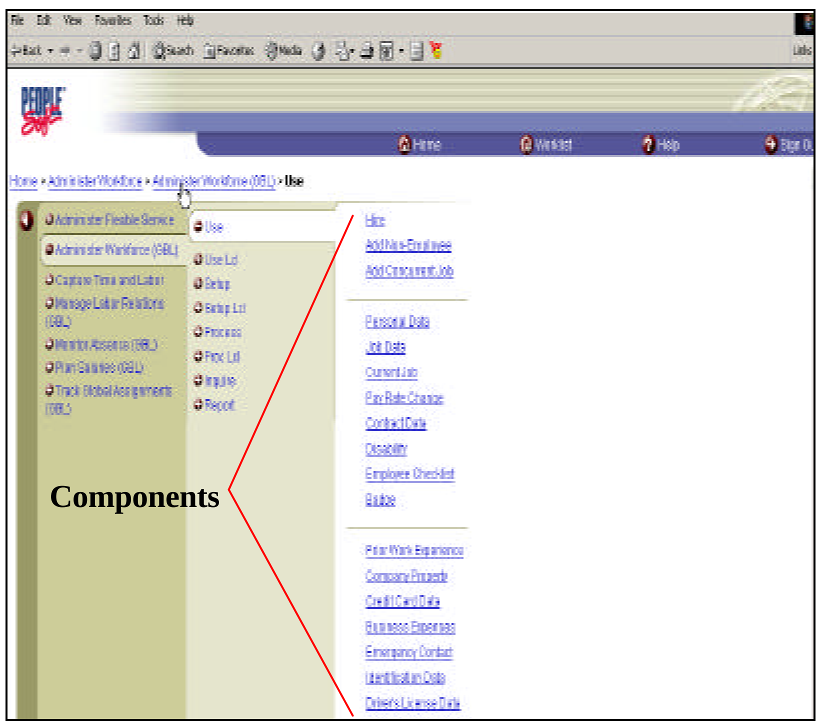
INTERNET ARCHITECTURE TERMINOLOGY

There are some basic terms used throughout the PeopleSoft Internet Architecture. Prior to using you application you will need to become familiar with these terms.

Navigation Header	The header area in PeopleSoft Internet Architecture will remain static as you navigate through your pages. The navigation header contains: link back to your Homepage, help button, and a Sign-off button.
Breadcrumbs	A small horizontal menu of links. This creates a visual path for where you currently are in the system. You can click on any part of the Breadcrumb path to return to a previous location.
Menu Group	Represent functional categories, such as: Administer Workforce.
Menus	A column navigation list that contains menu headings and links that guide you from page to page throughout your system.
Menu Item	Menu items vary from menu to menu but consist of Use, Setup, Process, Report and Inquire.
Components	Components are associated with menu items that allow you to perform specific actions. These can contain single or multiple pages.
Pages	Are windows into your data tables. Users are authorized through security to perform various actions within each page.

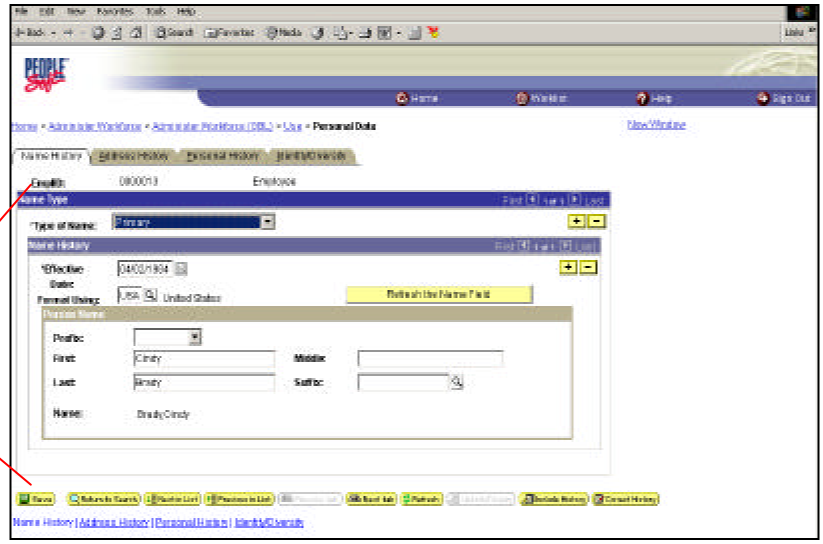


Navigation Header
Breadcrumbs
Menu Group
Menu
Menu Items
Home
Home > Administer Workforce > Administer Workforce (GBL)
Develop Workforce
Administer Workforce
Compensate Employees
Monitor Workplace
Define Business Rules
Self Service
Define Integration Rules
Packaging
PeopleTools
Administer Flexible Service
Administer Workforce (GBL)
Capture Time and Labor
Manage Labor Relations (GBL)
Monitor Absence (GBL)
Plan Salaries (GBL)
Track Global Assignments (GBL)
Use
Use Lcl
Setup
Setup Lcl
Process
Proc Lcl
Inquire
Report



Components
Home
Worklist
Help
Use
Use Lcl
Setup
Setup Lcl
Process
Proc Lcl
Inquire
Report
Hire
Personal Data
Job Data

Page



NAVIGATING THROUGH PEOPLESOFT

Now that you have learned the navigational terms, let's take a minute to review them.

- Navigation Header
- Breadcrumbs
- Menu Group
- Menu
- Component
- Page

USING MENU NAVIGATION

PeopleSoft's browser-based interface provides an intuitive way of updating or viewing data in the database. The menu columns are set up as lists of links that enable you to navigate to the desired component or page. The navigation header remains constant, containing links to Home and to Signoff.

The *three-column menu structure* is the primary means of getting around PeopleSoft. This menu structure consists of up to three columns that collapse and expand based on your selections.

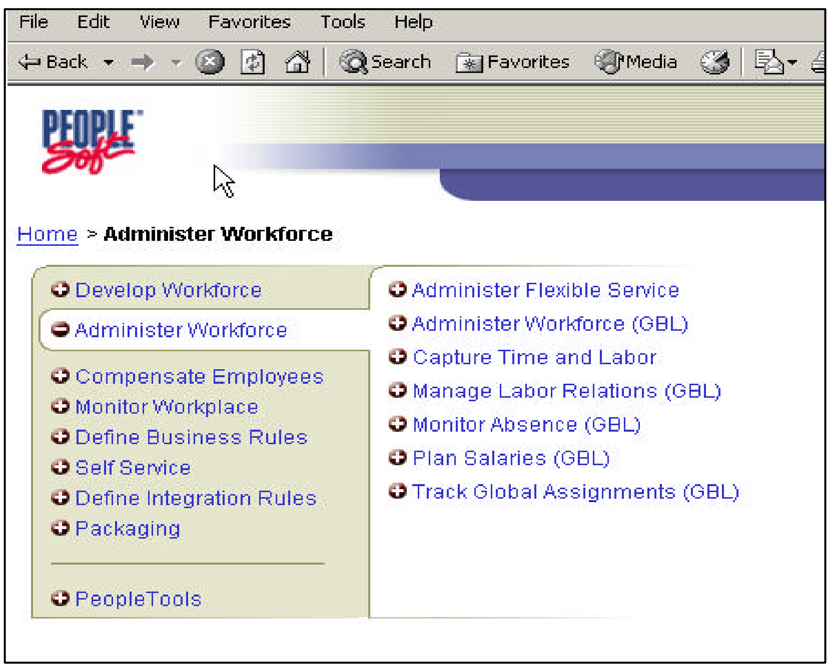
The main column or the first column, also known as Home, contains a general list of the areas you can link to in that application.

*A **plus sign*** *before a listing* indicates that there are sub-levels to view under that heading. Click the plus sign or the heading name to view the sub-levels. *A **minus sign*** *before a listing* indicates that the heading is already expanded to show its sub-levels.

EXPANDING AND COLLAPSING COLUMNS

Starting from the 'Home' position. Let's use the PeopleSoft navigation with the plus and minus signs to view an employee personal data record.

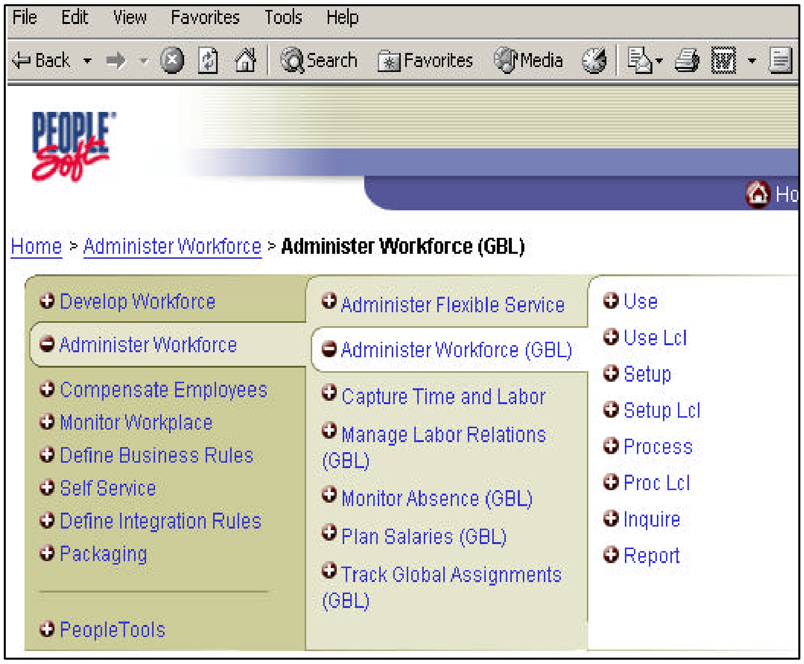
1. Click the plus sign "+" or the heading name next to it, to expand the first column.
   Menu Group - Administer Workforce. Notice the second column Menu list will appear.



2. Click the plus sign "+" or the heading name next to it, to expand the second column.

The second column *contains the sub-levels* to the main category you chose.

Menu – Administer Workforce GBL. Notice the third column of Menu Items will appear.



The third column typically contains **Menu Items** that lead you to different components, depending on the type of activity you want to complete. In most applications, the basic activities you can choose are *Use, Setup, Process, Inquire, and Report*. Each of these activities present a different type of category defined as follows:

Use	Contains all the transactions in your database where you can update/display, correct, or add past, current, and future data to the system.
Setup	Contains all the base tables for your data from which transactions are built. Use these pages to edit or add data to base tables.
Process	Contains pages that enable you to schedule or run a process request.
Inquire	Contains pages that will be displayed as read-only pages. You will not be able to edit or update any of the data in these pages.
Reports	Contains pages that enable you to produce reports or queries.

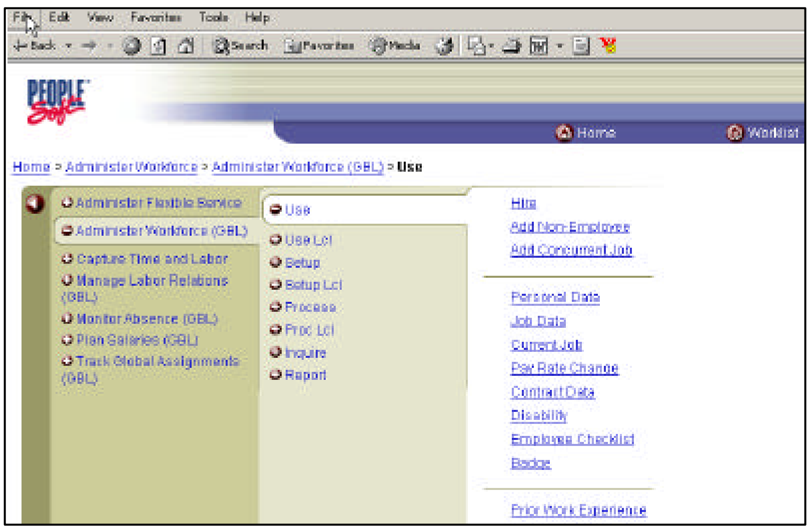
Depending on which Menu Item you choose from the second column, you may notice that some of these choices have a number or abbreviation after them, such as a **2 or *Lcl***.

The ***number 2*** *indicates that the list of components in that category is broken into two lists* because it was too long to fit on one page. *(Not shown)*

The *abbreviation* ***Lcl*** *indicates that the components under that category are for locality-specific contexts* (such as for a specific country) rather than for global use.

3. Click the plus sign "+" or the heading name next to it, to expand the Component column.

   Menu Item – Use. Notice the fourth column of Components will appear and the first column (Menu Group) collapses.



After Home, the menus expand to up to three levels. The Home column will collapse to accommodate the fourth column, as we just learned. You can bring this column back by:

- Pressing the "back arrow" under home 
- Selecting any previous option on the breadcrumbs path

Use the breadcrumbs to return quickly to a particular level of the menu. They also serve as a **quick reference** indicating where you are in the system.

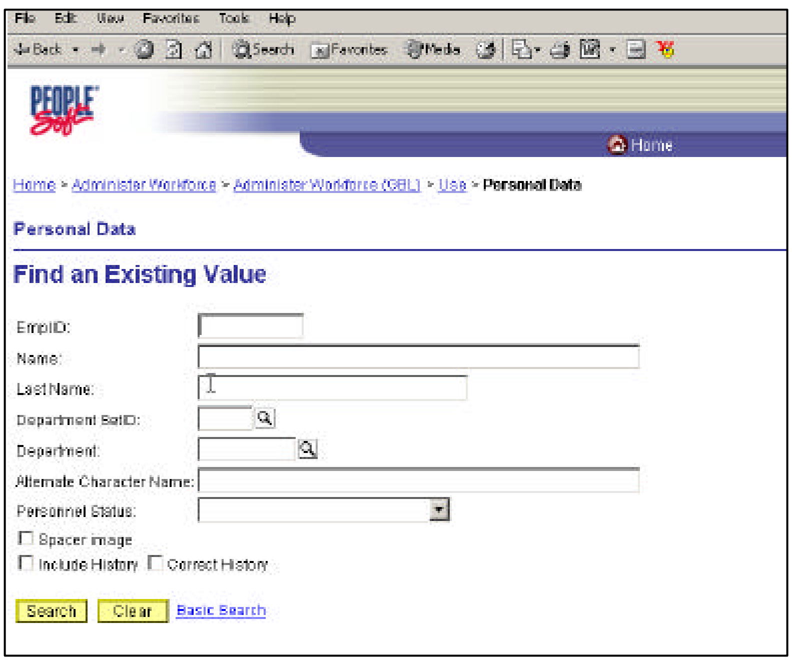
- Selecting the minus sign to collapse to the selected level.

The final menu column (**Components**) will consist of underlined links, that when clicked, will replace the menus with the search window that you will use to define the specific page you are looking for.

SEARCH PARAMETERS

To find existing data, you must use a search dialog box. In our example – Finding an employee's Personal Data information, continue with the next step.

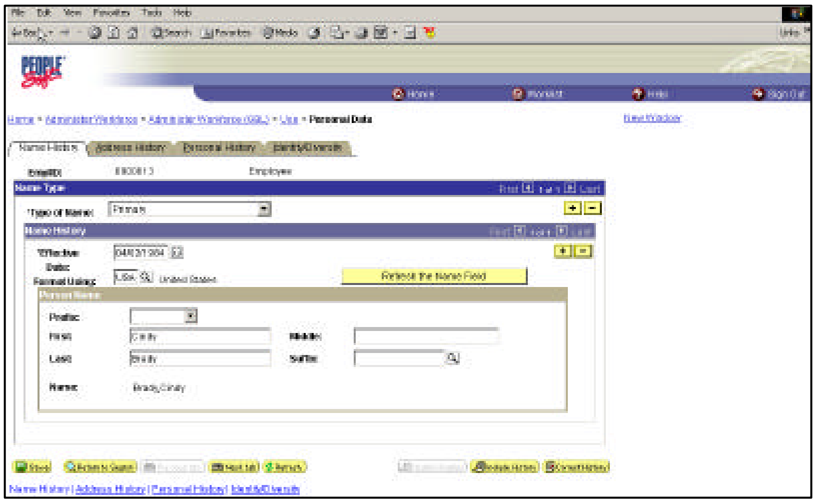
4. Click on the link **Personal Data** and the following search dialog box will appear:



Typically, you will have various field values that complete a search. Values you enter identify the data rows you want to display on the selected page. The more fields or characters you enter, the more specific your search results. *How to enter search information is discussed in greater detail in section "Using Keys and Search Pages.*

5. Enter the Employee ID in the EmplID box. *Your classroom instructor will provide you with an employee number.*

Congratulations! You are now in an employee's Personal Data Component consisting of 4 pages: Name, Address, Personal Profile and Eligibility/Identity.



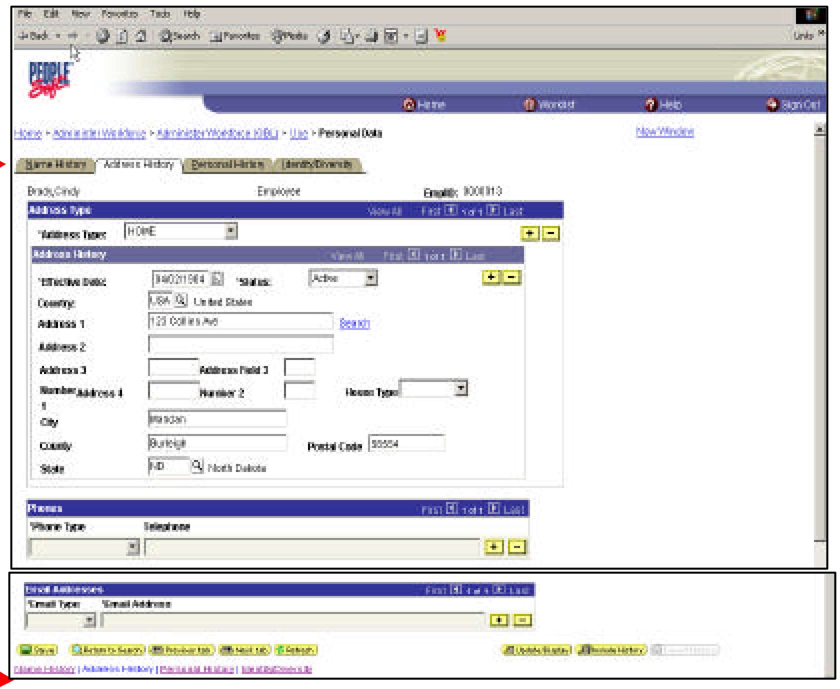
COMPONENTS

Components consist of several pages within the same window. Usually these are *pages that are related* and *need to be completed together*.

As you finish with one page, click the folder tab of the next page to open it. In addition to clicking folder tabs, you can also click the links at the bottom of each page in the component to move to the next page.

Address Tab

Component Page Links



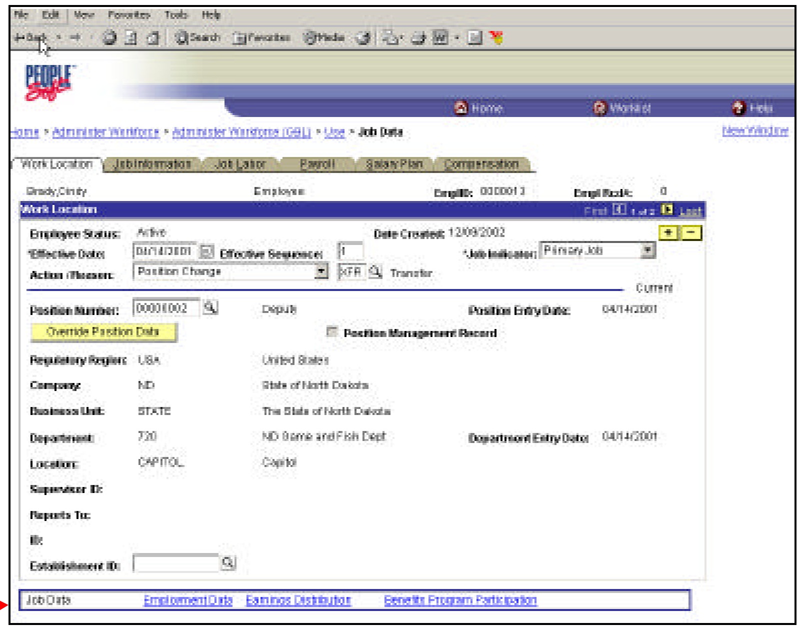
All pages in a group have the same search record so the prompt in the initial search dialog box is the same regardless of which page you access first—and you won't be prompted to enter new search criteria as you move from page to page in the component.

Pages in a group are treated as a single entity when you try to save data. When you click the save button, data on all the pages is committed to the database.

When saving, you may be prompted to enter data in required fields, if the system has not prompted you to do so already.
Occasionally you will see pages that, in addition to having links to other pages in the component, have links to related components or pages. The component shown below, for example, contains three related links at the bottom of the page.

You may click any one of these links to access that page or component for the employee record you currently have open. This convenience allows you to move easily to related transactions to enter data without going through the search process again.

We will use the employee Job Record as an example.



Related Component Page Links

Note: Job Data is not highlighted as a link. This is because Job Data is the component that you are currently in. Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation are all a part of the Job Data component. When you click a component link, you'll notice that the new transaction contains the same component links, enabling you to return to the original transaction if desired.

NAVIGATING TO ANOTHER PAGE

There are essentially two ways you can navigate to a new page.

- One – you can stay within the same window and follow the menu links, or breadcrumbs as we just learned.
- Two, open a New Window.

At the *top of all pages* you may notice the **New Window** hyperlink. Clicking this link will open a new browser window, or child window, showing the menu navigation to your current position.

From this point you can open a new transaction to view or enter new data. You may open any number of child windows as necessary.

OPEN A NEW WINDOW

Let's take a few minutes and review the Related Components Link feature. Open a new window and navigate to the Job Data record.

Navigation:
Administer Workforce > Administer Workforce GBL > Use > Job Data

Click on the Related Component Page Links *(Employment Data, Earnings Distribution and Benefits Program Participation)* to view the results.

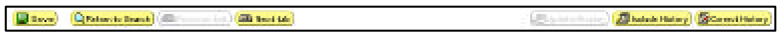
There are certain rules of thumb to keep in mind when using PeopleSoft's New Window feature:

Before opening a new window, save any changes made in the current window. If the session times out while you are working in a new window, you may lose any unsaved changes.

After a certain length of inactivity in one of the child windows, your new window session will timeout or expire. This does not invalidate your other current windows, but simply means this expired window is no longer useable. Any unsaved changes will be lost.

TOOLBAR & BUTTONS ON A PAGE

At the bottom of most pages you'll find the toolbar, which changes depending on the type of page you are in. The toolbar may include search list navigation buttons, page navigation buttons, and page action buttons. The toolbar changes depending on the type of page that's active. Not all buttons shown below will display on every page. Likewise, some buttons may be grayed out, indicating this action is not available to you at that time.



If a gray button appears on your page, that action is not available to you. Update/Display

Save	Sends the information you've entered on the page to the database. You'll generally save when you come to the end of a component. The Save command always updates the data for all pages in a group. Upon save, the system displays the "Saved" message in the upper right corner of the page.
Return to Search	Returns you to the search page
Next in List	Displays the data for the next data row in your search results grid. This button appears gray if you didn't select the data row from a search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.
Previous in List	Displays the data for the previous data row in your search results grid. This button appears gray if you didn't select the data row from the search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.
Next tab	Displays the next page in the current component. If you are in the last page of the component, this button is gray.
Previous tab	Displays the previous page in the current component. If you're in the first page of the

	component, this button is gray.
Update/Display	Accesses existing rows of data on the database. If data is effective-dated, displays only current and future rows.
Include History	Displays all rows of data: current, future, and history.
Correct History	Accesses existing rows of data in the database and displays all effective-dated rows. Will allow you to update all rows, including history rows.
Refresh	Appears for expert users only that are in Expert Entry mode. When clicked, validates the data entered in certain fields.
+...	Inserts a new row.
−	Deletes a row.

DATA ENTRY: FIELD FORMATS

Upper vs Lower Case

Many data fields are case sensitive. It is important that the information is entered using proper capitalization. PeopleSoft does not convert data to one case or the other unless the field requires the entry to be all capitalized, i.e. State. In these cases, the system will automatically convert the entry to the correct format.

Names

Names are stored in the PeopleSoft database in the following format: Last name,(no space)First name (space with no punctuation) Middle initial. When hiring a new employee in PeopleSoft 8.0 the name format will automatically populate in the Name field on the Personal Data page after the employees First Name and Last Name fields have been entered.

Dates

Type dates as MMDDYY. PeopleSoft will enter the slashes and fill the year to four places after pressing Tab, i.e. 020199 becomes 02/01/1999. If the year being entered is 1950 or before, the system will automatically format the year as 2000 i.e. May 5, 2030 entered as 050530 = 05/05/2030. If the year being entered is from 51 to 99 the system will automatically format the year as 1900. i.e. May 5, 1968 entered as 050568 = May 5, 1968.

Dollar Amounts

Type in the dollars with the decimals if there are cents to be keyed. The system will automatically insert commas for long numbers.

Social Security Numbers

Type SSN numbers as # # # # # # # # #. PeopleSoft will insert the dashes after pressing the Tab key. i.e. 123456789 becomes 123-45-6789.

Zip Codes

Type zip codes as either five or nine digit numbers. PeopleSoft will insert the dash after pressing the Tab key. i.e. 981011015 becomes 98101-1015.

Phone Numbers

Type phone numbers with ten digits (area code + phone number). PeopleSoft will insert a slash and a dash after pressing the Tab key. i.e. 2062961000 becomes 206/296-1000.

USING KEYS AND SEARCH PAGES

OVERVIEW

This section describes keys and search pages.

OBJECTIVES

After completing this section, you will be able to:

- Understand the definition of keys and search pages.
- Understand how to use keys and search pages.

KEYS AND SEARCH PAGES

A field, or a combination of fields, uniquely identifies every table in the PeopleSoft database. For example, the **Employee ID** field uniquely identifies employee records.

The display-only fields that uniquely identify data are **keys**. To display a page, you'll enter the keys to search for on the Search page so that the system can retrieve the correct row of data. For instance, if you want to retrieve the Personal Data page for Jim Smith, you must specify the key data in the search record for that employee.

A search record is the list of defined search keys that help you locate data. <u>These are the fields you are prompted for on a search page.</u> Every transaction page, or component listed in the menu columns, has a search record associated with it. If you select other pages that have a common search record, such as pages within a component or an associated link, you will not be prompted to enter search criteria again. You'll be prompted for new search keys only when you select a new page outside of the component with a different search record.

SEARCH BUTTONS

The following search related buttons are located on Search pages of all types.

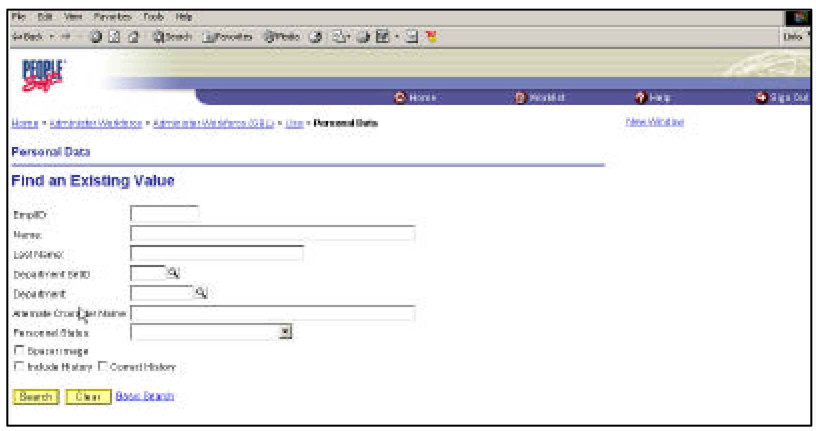
Search	Processes the search once you have entered search criteria in the key fields above the Search button.
Clear	Clears entered text from all fields on the page so you can enter new criteria.

SEARCH PAGES

There are two types of search pages: the basic search page and the advanced search page. When you select a page to navigate to, the system will often display an advanced search page, such as the Personal Data page shown below. The advanced search page generally offers several keys by which you may search for your record. It allows you to narrow down your search by entering in more than one type of criteria. The Personal Data advanced search page below contains seven fields starting with the EmplID (Employee ID) field.

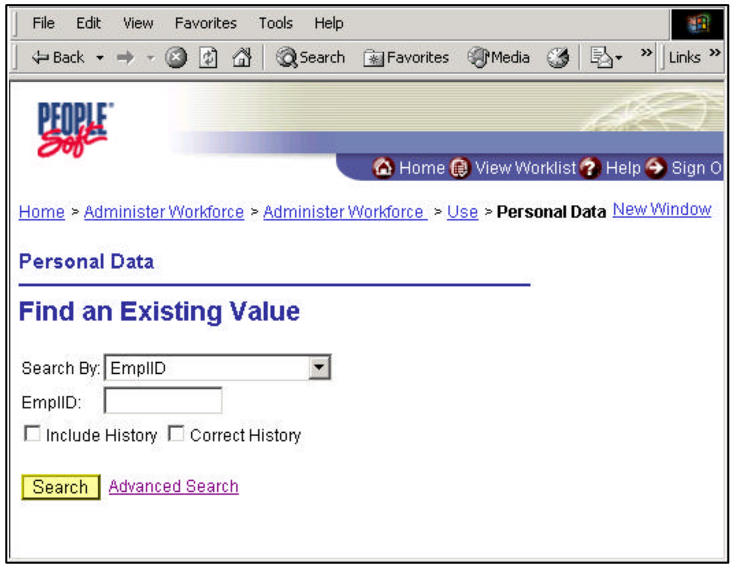
Navigation

Home > Administer Workforce > Administer Workforce GBL > Use > Personal Data

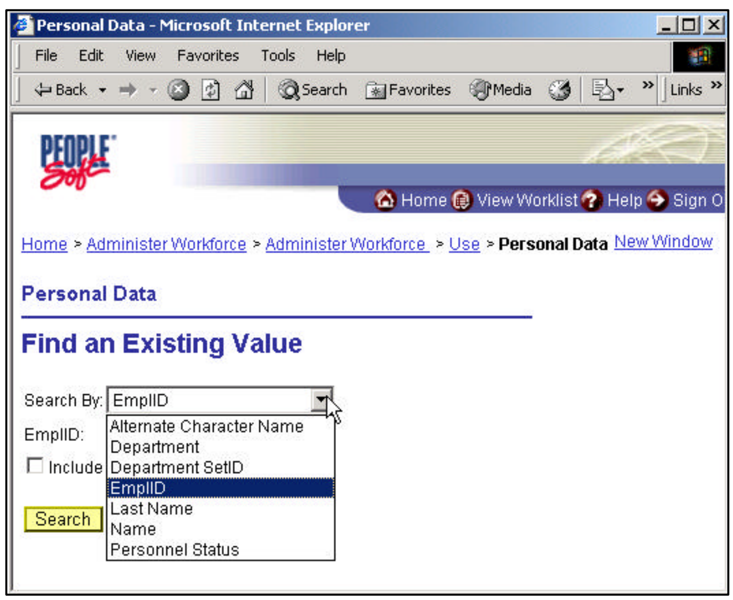


Click the blue **Basic Search** hyperlink.

If the search page offers a basic search option, it will appear as a link next to the search action buttons. In general, a basic search page offers just one or two fields by which you may perform your search. However, you may designate which key field you would like to search by from the **Search By** drop-down list box.



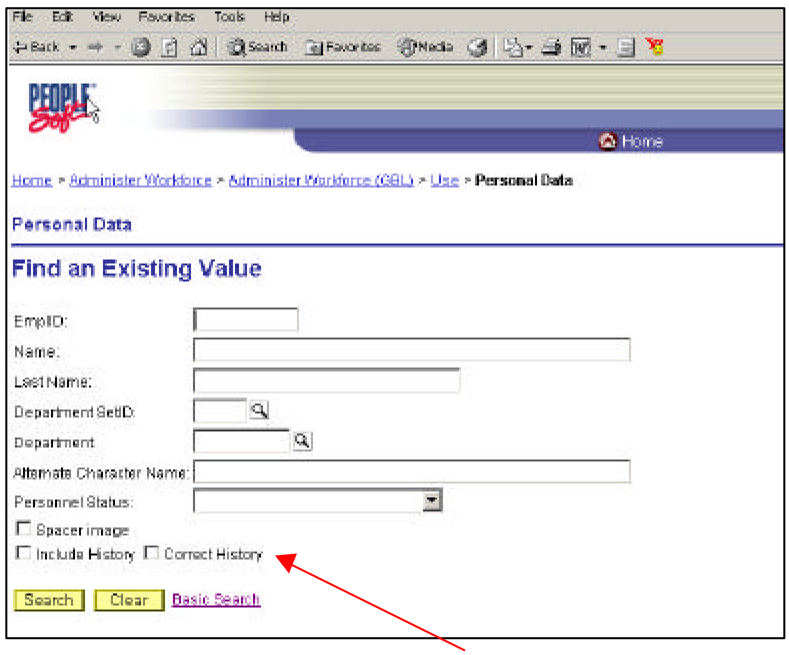
Click on the drop-down arrow of the **Search By** field:



INCLUDE HISTORY & CORRECT HISTORY

Correct History Mode recommended for Managers only

Many search pages, both the advanced and the basic, contain the **Include History** and **Correct History** check boxes as page action options. You can select what type of action you want to perform for your record before retrieving that record by selecting the appropriate check box. Or, if you are unsure, you may leave the check boxes clear. You will again have an opportunity to select the page action once you open the page you are searching for.



Include History and Correct History

Include History	Includes future, current, and historical dated rows.
Correct History	Allows a user to make a correction without creating an effective dated row. This function should be available to authorized personnel only.

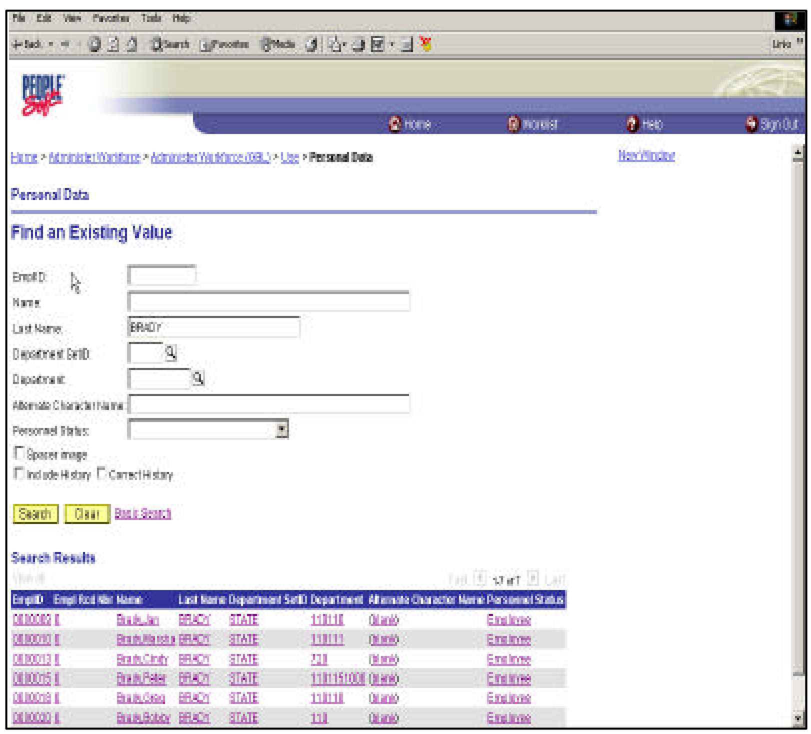
ENTERING SEARCH CRITERIA

You can enter a full or partial value for any key field. Based on what you enter in the dialog box, the system uses the search record to present you with a list of possible matches, or if there is only one match, the page you requested. Often, however, you don't have all the information you need. For example, if you are searching for all employees that have a last name of Smith, you can enter their last name and click the Search button.

Navigation:
Home > Administer Workforce > Administer Workforce GBL > Use > Personal Data

Enter an employee's last name in the "Last Name" field.

The system will display employees with the last name entered in the Search Results grid. You may be able to determine which employee is the correct one based on the additional information displayed in the Search Results grid. To access the employee's data, click any of the underlined hyperlinks in the Search Results grid.



If you are not sure how to spell an employee's name you can enter the first letter of the last name and the system will return a list of all employees with the last name that begins with the letter you entered.

Clear Brady from the "Last Name" field by clicking on the clear button.

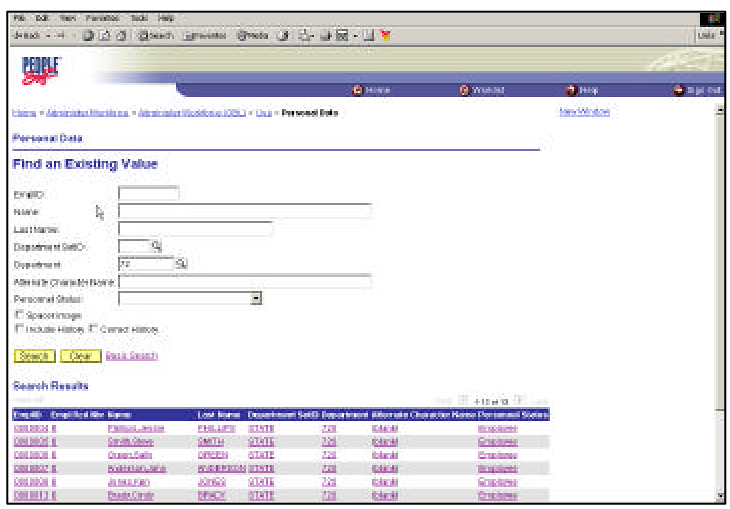
Enter B in the "Last Name" field

The system returns all employees whose last name begins with a "B".

That logic works for the Emp ID and Department Number fields. You do not need to know the exact ID or Department number.

The search function will display up to 300 retrieved entries from the database in the Search Results list. Use your browser's scroll bar to view all listings on the current page. If the list is subdivided, click the right-pointing arrow above the grid, or press Alt(+) to view the next set of listings.

If your search retrieves more than the maximum 300 listings, the Search Results will indicate 1-100 of 300, as shown below. You should then attempt to narrow your search in another way, if you are not able to retrieve the data you need on the first attempt.



Note: To display all the records that have been retrieved you can click on the View All link.

From these search results, a single click on any column in a row retrieves the employee's Personal Data record with the latest information on that employee.

WORKING WITH PAGES

OVERVIEW

This section describes the various parts of Pages and how to use Pages to enter and store data.

OBJECTIVES

After completing this section, you will be able to:

- Use Pages to enter and store data effectively and efficiently in your PeopleSoft system.
- Understand effective dated row logic.

OVERVIEW

Pages are the primary graphical interface (window) by which you view and alter data in the PeopleSoft system. Pages are representations of rows of data in the database tables. They are used to view, enter, and update data stored in application tables. Each page display also provides features in the form of buttons, or links to help you navigate through the system. As you make changes, or add to the database, you'll need to be familiar with effective-dating logic, as well as the various page action options used with historical, current, and future data.

It will also be helpful if you familiarize yourself with the types of page elements you will encounter on pages and how they work. There are many different types of elements to organize information on pages that enable you to enter data, including aesthetic elements, data-entry elements, and functional or data processing elements.

If at anytime you have a question while working on a page, press the Help button in the navigation header. This action will open PeopleBooks that explains the particular page in which you are currently working.

EFFECTIVE DATING LOGIC

When you update existing information, you do not want to lose or overwrite the data already stored in the system. To retain history, you can add a new data row identified by the date when the information goes into effect: *an effective date*. An effective date is a date listed in the column of a table that is a key, but it is not a search key.

PeopleSoft's effective-dating logic enables you to maintain an accurate history of information in the database. Effective dating allows you to store current data, historical data (changes in your data over time), and future data in tables.

The PeopleSoft system categorizes effective-dated rows into the following basic types:

Future	Data rows that have effective dates greater than the system date. There can be more than one row.
Current	The data row with the most recent effective date less than or equal to the system date. Only one row is the current row.
History	Data rows that have effective dates less than the effective date of the current data row. There can be more than one row.

CENTURY DATES

When you enter a two-digit year in a date field, PeopleSoft sets the century to '20' if the year entered is less that 50. Otherwise, it sets the century to '19' for years 51 or greater.

Century defaults to 2000	For dates ranging 0-50
Century defaults to 1900	For dates ranging 51 +

For example: 011560 in the date field would translate to January 15, 1960 – 01/15/1960. While 011549 in the date field would translate to January 15, 2049 – 01/15/2049.

PAGE ACTION TYPES

PeopleSoft has four general options that you can use within the system when accessing information. Based on the user and their level of security, not all of the four options may be available.

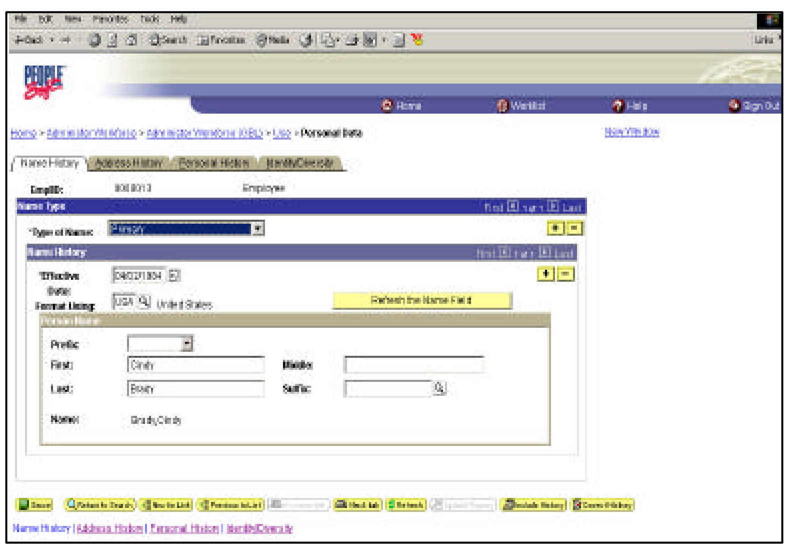
The action you select tells the system the type of activity (action) you want to perform in the database.

Search Dialog Box	Buttons Displayed on a Page	Action
Add a New Value	Add	Add actions add a new row of information to the database with a new high-level, primary key. Example found under the Setup Menu Item list.
Default Value	Update/Display	**The default when you enter a page is Update/Display. Displays current and future rows of data.** To update information, insert a new row of data by using the Insert Row button.

☐ Include History	Include History	This action works is similar to Update/Display, except it includes viewing history data row.
☐ Correct History	Correct History	Correct History is the most powerful of the action types. When you choose this option, you can view, change, and insert rows of data regardless of the effective date. You want to be very careful with who has this option within your company.

Note: When you insert a new row into an effective-dated table, the existing information is copied over into the new row and identified by the system date – usually today's date. Simply change the data and enter the date on which you want the change to go into effect.

The Update/Display, Include History and Correct History page action buttons are located in the toolbar at the bottom right of each page on which they are applicable. You can toggle between these buttons by clicking on the desired action button. A grayed out button indicates the page is currently in that mode. Notice the page below is currently in Update/Display mode.



DATA ENTRY FIELDS

On pages, you'll see several types of data-entry fields, each designed to offer different ways to enter and maintain information. The different kinds of data-entry fields serve a common purpose—to provide a simple way to enter and update data in the tables. You'll type data directly into some fields, such as edit boxes and long edit boxes. Other data-entry fields (such as radio buttons and drop-down list boxes) present you with a list of choices. Understanding how to use each type of data-entry element will help you use the system more efficiently.

Data-entry elements, which are always associated with specific database fields, include the following:

Check Box	Small, square box that enables or disables an option. Typically, you *select* the check box by clicking within it; this adds a check mark and the option becomes enabled. Click it again to *clear* the check box and the option is disabled.
Drop-down list box	Rectangular box similar to an edit box with a prompt button within the box. Clicking the prompt button expands the box to display a list of valid values from which you can select a single option.
Edit Box	Rectangular box into which you enter data. The size of the edit box—the number of characters you can enter—is determined by the length of the database field. Edit boxes for fields with prompt tables have a prompt button to the right.
Grid	Entry fields arranged like a spreadsheet with a navigation bar or footer and (Add) and/or (Delete) buttons for each row.
Long Edit Box	Long rectangular box into which you enter long text items such as comments.
Radio Button	Small round button that represents one option in a group of mutually exclusive options. Only one radio button in a group can be selected at one time (by clicking it).
Scroll Areas	An area where entry fields are arranged in a framed area with a navigation bar or footer. Each row of data may contain (Add) and/or (Delete) buttons.

TABBING

To move among the data-entry fields on a page, press the Tab key or click once on the field. The Tab key moves you one field at a time in a sequence determined in the page definition. Tabbing will also rest on prompts to give you the option of viewing the prompt table or calendar. To open a prompt or calendar you can press the Enter key. Or, to get to the next field press the Tab key again. Shift+Tab moves you back, rather than forward.

REQUIRED FIELDS

In most applications, an asterisk next to a data-entry field on a page indicates it's a required field. Unless deferred processing has been set for this page, data must be entered in that field if you want to continue on to the next field, or to save the page. If you save the page before entering data, the field will turn red and an error message dialog will display on your page. Click 'OK' on the error message and enter the correct data in that field. Required fields are often drop-down lists or are accompanied by a prompt button to assist you in entering the correct data. Make use of these prompts to help you find the correct data.

WORKING WITH REPORTS

OVERVIEW

This chapter describes how to run and view reports through the process monitor and report manager.

OBJECTIVES

After completing this section, you will be able to:

- Run Reports.
- Review Reports through the Process Monitor.
- Review Reports through the Report Manager.

RUNNING STANDARD REPORTS

In your day-to-day work, you run reports much more frequently than you define reports. Reports are generally predefined by others, such as: PeopleSoft, department managers, or the technical department. However, they can even be designed you.

Although much of your interaction with the PeopleSoft system involves working with the online pages of a PeopleSoft application, you'll also execute off-line, or batch, processes that run in the background while you are still using the application or even after you've left the office.

An off-line, or batch, process is a predefined process or program that runs independent of any end user intervention. Some typical, off-line processes are payroll, journal posting, complex mathematical calculations, or generating reports that you share with colleagues.

You run off-line (batch) processes in the PeopleSoft system using Process Scheduler Manager. Process Scheduler Manager allows your organization to define processes, submit requests for processes, and set up an "agent" that scans for submitted processes and runs them.

As an end-user you'll only need to be concerned with successfully submitting process requests, monitoring their progress, and viewing their output in Report Manager. You can safely leave Process Definitions and configuring the Process Scheduler Server Agent for the technical staff at your site.

In this chapter, we cover the general procedure for running the standard reports that come with your PeopleSoft applications. If you (or someone in your organization) have added custom reports to the system, the procedure should be similar to the one we describe.

The following sections briefly introduce you to the fundamentals of submitting, monitoring, and viewing your reports. We cover the following topics:

- Requesting Reports in PeopleSoft Applications
- Running Reports using the Process Scheduler
- Checking the Status of a Report
- Viewing Report Results

Note: The procedure described in this chapter applies to most standard reports, but not all of them. Some PeopleSoft applications include reports that you run from outside the system, using PS/nVision or a third-party application. The documentation for your application tells you which application to use.

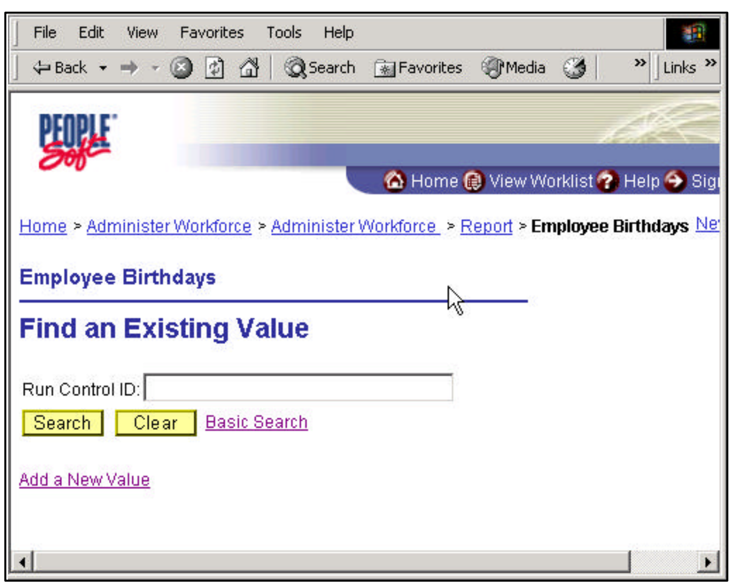
Requesting Reports in PeopleSoft Applications

Navigation:
Administer Workforce > Administer Workforce GBL > Report > Employee Birthdays

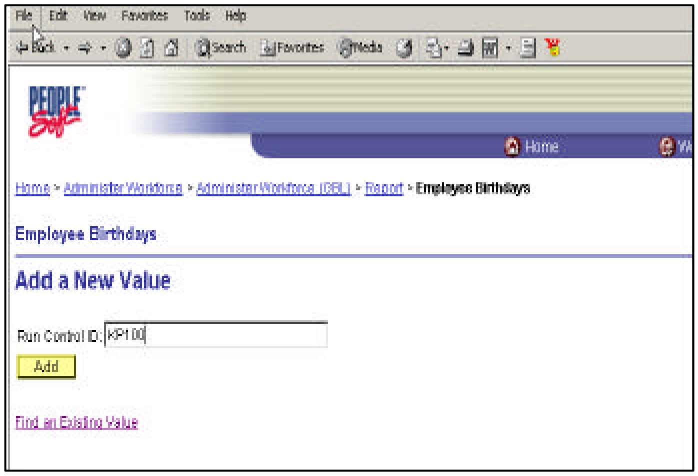
The Report Menu List will display several delivered reports that are available through PeopleSoft. For our example we are going to use the Employee Birthdays report.

1. Follow the navigation listed above.

When you select a report from a menu, you will be prompted for a Run Control ID. Each run control you create receives a unique Run Control ID. You may use any value for a Run Control ID. If there is not a predefined Run Control ID, you can create one by clicking on the Add a New Value link.



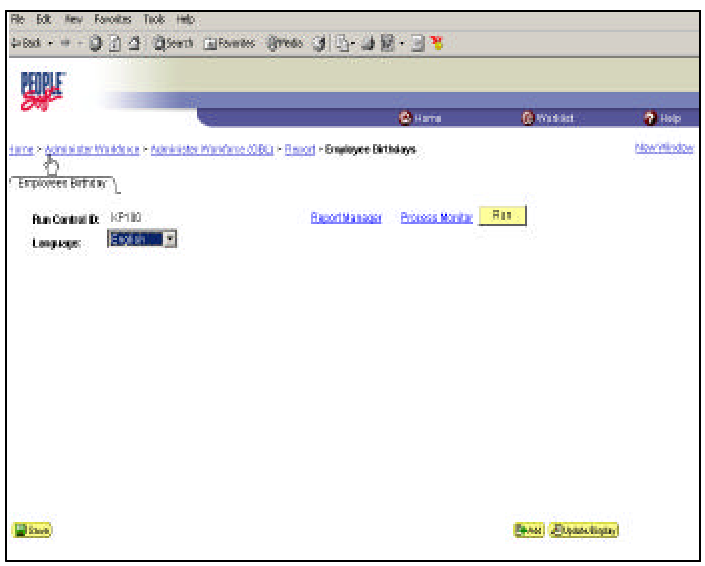
2. Click on the Add a New Value link and enter a value for your Run Control ID. This value can be used as often as you like. Select the Add button.



You are now ready to 'Run' your report through the Process Scheduler.

RUNNING REPORTS USING THE PROCESS SCHEDULER

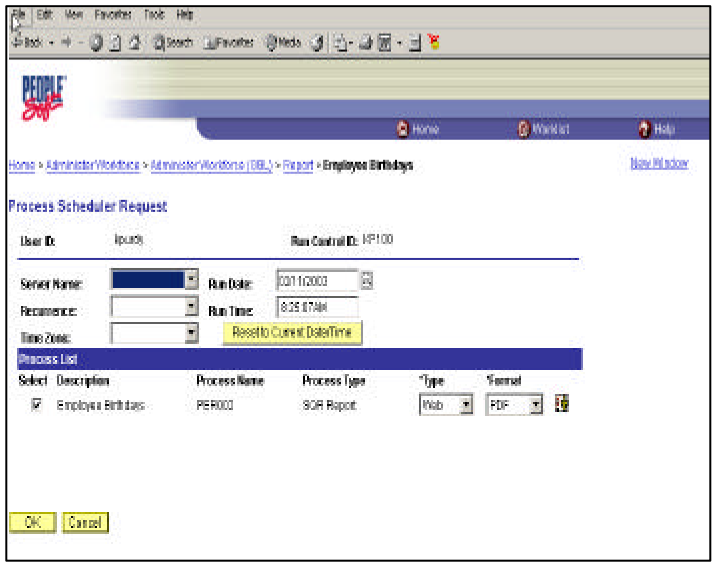
The following page will appear after you have added your Run Control ID.



1. Fill in any parameters that are being requested. For example: the system is requesting a Language. Select English.

2. Click on the Run button. 

The **Process Scheduler Request** page will appear:



3. Enter the Server Name where your process is going to run. (PSNT)

4. The 'Type' and 'Format' will default to the values set for the delivered report. These values can be changed from this panel. 'Web' and 'PDF' are most commonly used.

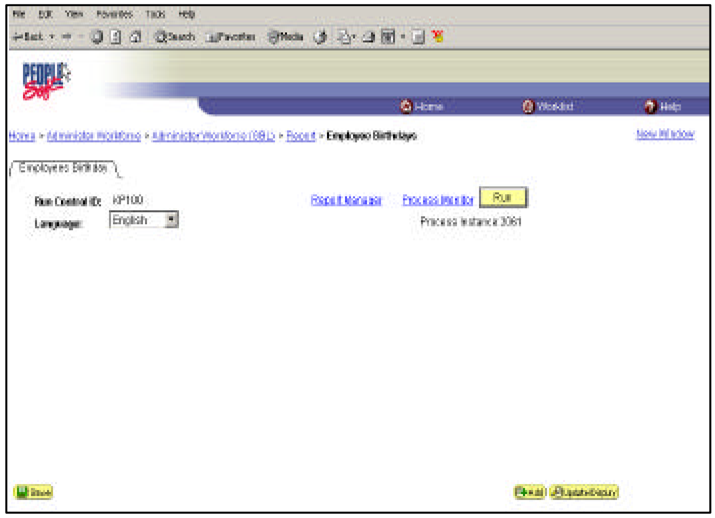
5. Select the 'OK' button to continue, or the Cancel button to cancel the process.

6. The wording 'Processing' will appear in the top right-hand corner while processing. The word 'Saved' will briefly appear when done.

You are now ready to check the status of your report.

CHECKING THE STATUS OF A REPORT

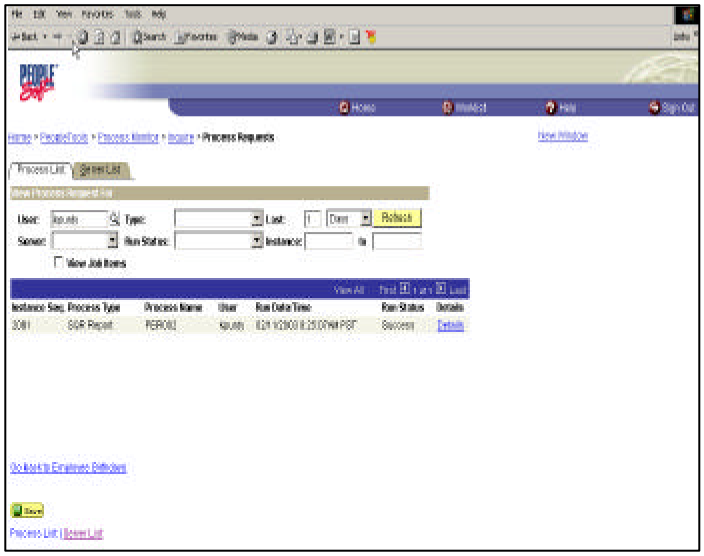
After you click the 'OK' button on the previous page, you will return to the page listed below.



1. Click on the Process Monitor hyperlink. This will take you to the Process Request page.

The Process Request page will display the Instance Seq, Process Type, Process Name, User, Run Date/Time, Run Status and Details.

Instance Sequence	The order that your request is being processed.
Process Type	The process type that is being requested. Examples: SQR Report, Crystal, COBOL, Application Engine.
Process Name	The technical name for the report.
User	The User ID running the report.
Run Date/Time	The Date and Time of processed.
Run Status	The status of the report: Queued, Initiated, Processing, Posted, Success.
Details	Link to view run logs and report results.



Various **Run Status** for reports are listed below:

Queued	Report is waiting to start processing.
Initiated	Report has begun processing.
Processing	Report is processing.
Posted	Report is posted in the Report Manager.
Success	Report has completed successfully.

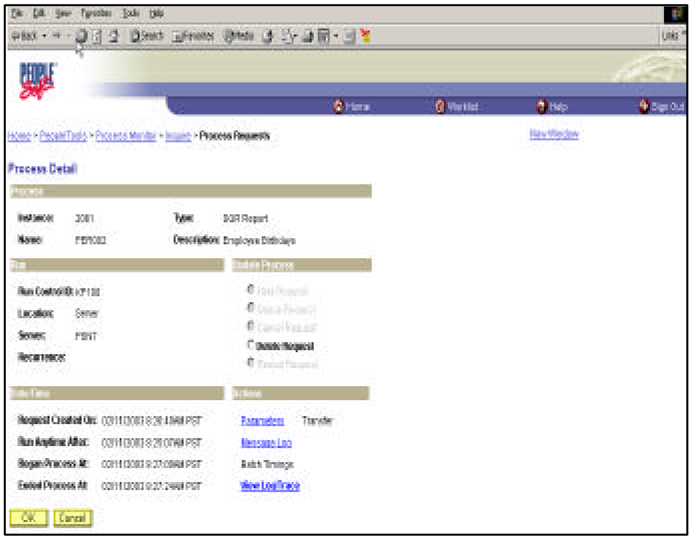
Depending on how much data you ask the system to retrieve, and depending on the system's current processing load, your report might take only a few moments or considerably longer to run, therefore you may not always see all of the processing stages.

Your user ID appears in the **User** list box. You can use the navigation arrows on the screen to scroll through the list. Use the **Server, Type, Run Status, Last,** and **Instance** list boxes to limit the processes that Process Monitor displays.

Click **Refresh** to update this page with the latest system activity. If the **Run Status** column says Initiated or Processing, the report is still running. When it says Success or Posted, the system has finished running the report.

From the **Process Request** page:

2. After you have received a run status of Success, click on the <u>Details</u> link and the following page will appear:

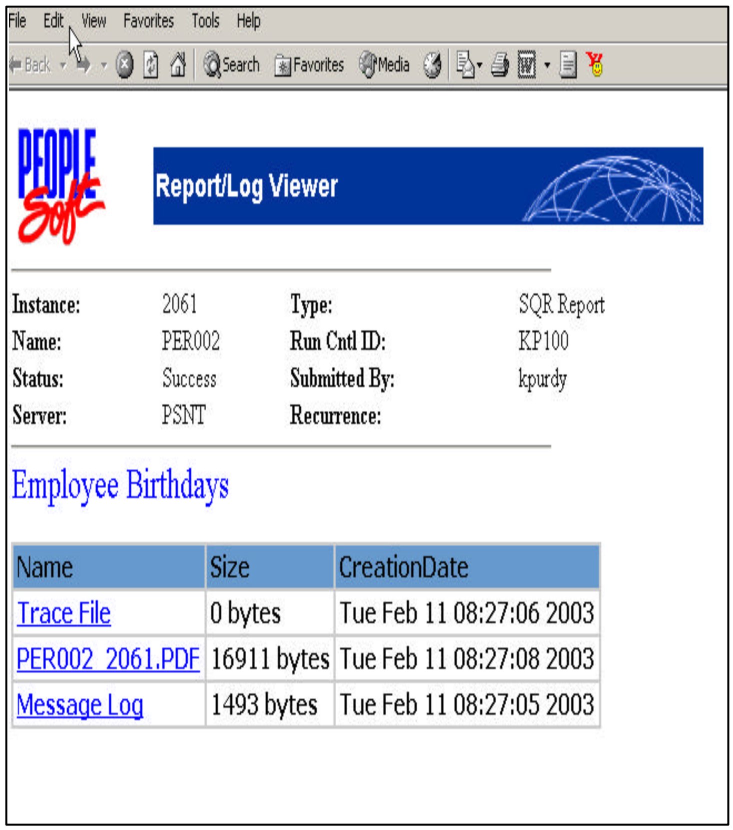


From this page you can view the Parameters that you requested your process from, any message logs and the actual report results.

VIEWING REPORT RESULTS

1. Click on the View Log/Trace link and the Report Log Viewer page will appear.

2. Click on the PER002_2311.pdf file to view your report. To view file with the .PDF format you must Adobe Acrobat Reader loaded on your system.



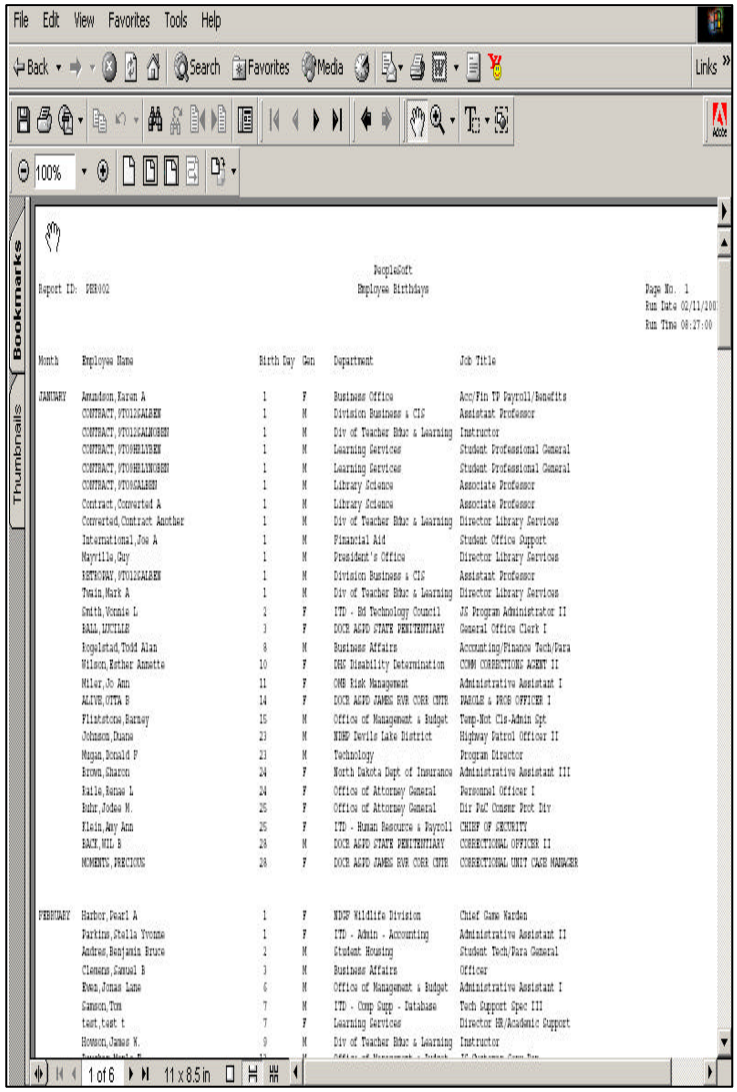
Report/Log Viewer

Instance:	2061	Type:	SQR Report
Name:	PER002	Run Cntl ID:	KP100
Status:	Success	Submitted By:	kpurdy
Server:	PSNT	Recurrence:	

Employee Birthdays

Name	Size	CreationDate
Trace File	0 bytes	Tue Feb 11 08:27:06 2003
PER002_2061.PDF	16911 bytes	Tue Feb 11 08:27:08 2003
Message Log	1493 bytes	Tue Feb 11 08:27:05 2003

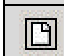
Note: The PER002 – is the Process Name that we requested earlier. The 2061– is the Instance Seq. and '.PDF' is the file format that we requested. The Message Log will display error messages for runs that were not successful. The Trace File is used by technical staff.



PeopleSoft
Report ID: PER002 Employee Birthdays
Page No. 1
Run Date 02/11/200
Run Time 08:27:00

Month	Employee Name	Birth Day	Gen	Department	Job Title
JANUARY	Amundson,Karen A	1	F	Business Office	Acc/Fin TP Payroll/Benefits
	CONTRACT,9TO12SALBEN	1	M	Division Business & CIS	Assistant Professor
	CONTRACT,9TO12SALNOBEN	1	M	Div of Teacher Educ & Learning	Instructor
	CONTRACT,9TO9HRLYBEN	1	M	Learning Services	Student Professional General
	CONTRACT,9TO9HRLYNOBEN	1	M	Learning Services	Student Professional General
	CONTRACT,9TO9SALBEN	1	M	Library Science	Associate Professor
	Contract,Converted A	1	M	Library Science	Associate Professor
	Converted,Contract Another	1	M	Div of Teacher Educ & Learning	Director Library Services
	International,Joe A	1	M	Financial Aid	Student Office Support
	Mayville,Guy	1	M	President's Office	Director Library Services
	RETROPAY,9TO12SALBEN	1	M	Division Business & CIS	Assistant Professor
	Twain,Mark A	1	M	Div of Teacher Educ & Learning	Director Library Services
	Smith,Vonnie L	2	F	ITD - Bd Technology Council	JS Program Administrator II
	BALL,LUCILLE	3	F	DOCR ASPD STATE PENITENTIARY	General Office Clerk I
	Rogelstad,Todd Alan	8	M	Business Affairs	Accounting/Finance Tech/Para
	Wilson,Esther Annette	10	F	DHS Disability Determination	COMM CORRECTIONS AGENT II
	Miler,Jo Ann	11	F	OMB Risk Management	Administrative Assistant I
	ALIVE,OTTA B	14	F	DOCR ASPD JAMES RVR CORR CNTR	PAROLE & PROB OFFICER I
	Flintstone,Barney	15	M	Office of Management & Budget	Temp-Not Cls-Admin Spt
	Johnson,Duane	23	M	NDHP Devils Lake District	Highway Patrol Officer II
	Mugan,Donald F	23	M	Technology	Program Director
	Brown,Sharon	24	F	North Dakota Dept of Insurance	Administrative Assistant III
	Raile,Renae L	24	F	Office of Attorney General	Personnel Officer I
	Buhr,Jodee M.	25	F	Office of Attorney General	Dir P&C Consmr Prot Div
	Klein,Amy Ann	25	F	ITD - Human Resource & Payroll	CHIEF OF SECURITY
	BACK,MIL B	28	M	DOCR ASPD STATE PENITENTIARY	CORRECTIONAL OFFICER II
	MOMENTS,PRECIOUS	28	F	DOCR ASPD JAMES RVR CORR CNTR	CORRECTIONAL UNIT CASE MANAGER
FEBRUARY	Harbor,Pearl A	1	F	NDGF Wildlife Division	Chief Game Warden
	Parkins,Stella Yvonne	1	F	ITD - Admin - Accounting	Administrative Assistant II
	Andres,Benjamin Bruce	2	M	Student Housing	Student Tech/Para General
	Clemens,Samuel B	3	M	Business Affairs	Officer
	Ewen,Jonas Lane	6	M	Office of Management & Budget	Administrative Assistant I
	Samson,Tom	7	M	ITD - Comp Supp - Database	Tech Support Spec III
	test,test t	7	F	Learning Services	Director HR/Academic Support
	Howson,James K.	9	M	Div of Teacher Educ & Learning	Instructor

Commonly used Acrobat Buttons

	Save to a file
	Send report to the printer
	Zoom In for larger view
	Zoom out for small view
	Navigate through pages
	Page actual size
	Page fit in window

Viewing Previous Reports

To check the status of your report, or view previously ran reports, you can navigation to two different locations:

- PeopleTools / Process Monitor / Inquire / Process Request
- PeopleTools / Report Manager / Inquire / Report List

Report Manager is like your own personal "in box" of reports and processes that you have access to. It provi des a secured means to view report content, check the status of a job, and see content detail messages.

Whether you are in the Process Monitor or the Report Manager your User ID will be displayed. Depending on your security settings, you may be able to change the User ID listing. To limit the results listed use one of the drop-down parameters and click the refresh button.

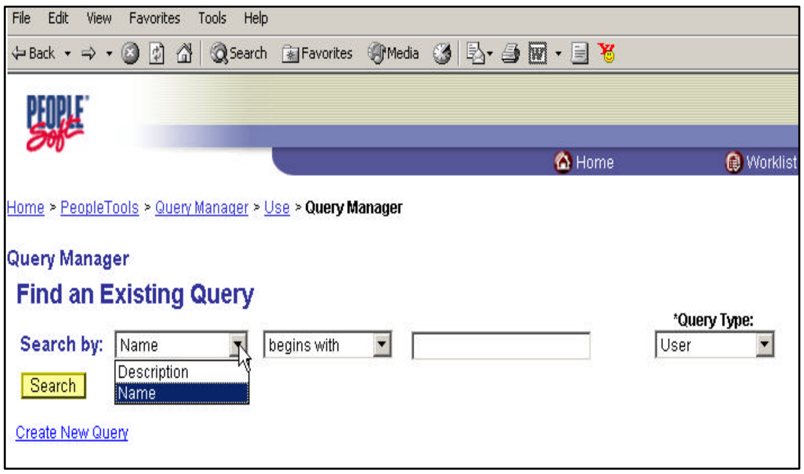
CANCELING OR HOLDING REPORT REQUESTS

Depending on the status of your report, you can cancel it or put it on hold. If the system is done processing a report, you can delete its information from Process Monitor. Click **Details** to display the options for canceling or holding a request.

WORKING WITH QUERY

VIEWING AN EXISTING QUERY

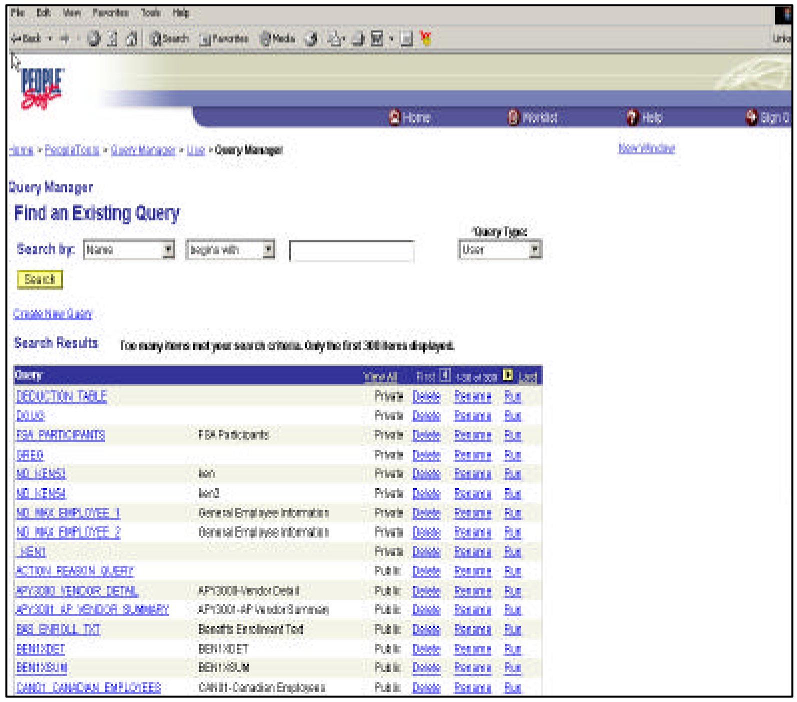
Navigate:
PeopleTools > Query Manager > Use > Query Manager



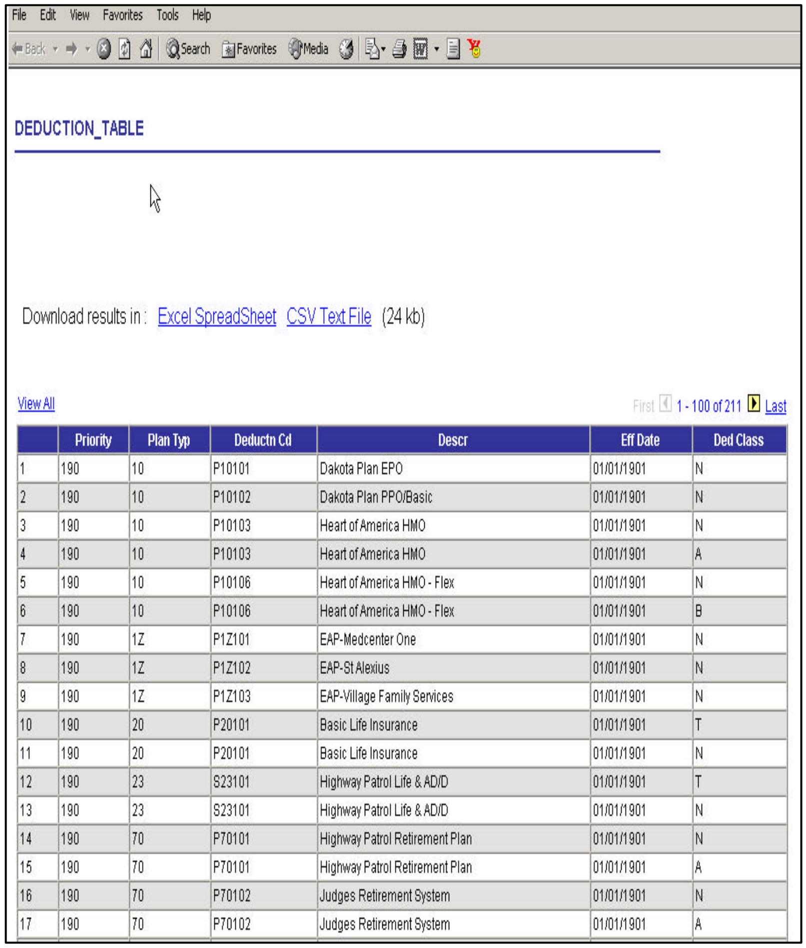
Click on the **'Search'** button for a list of available queries if you do not know the name of the query you are going to run. You can also narrow your search by enter the first few letters.

The query name will appear in the 'Search Results' as shown below:

Note: You can also enter the name of the Query in the search box.



Click on the ‘Run’ link for the query you are going to run (DEDUCTION TABLE) and a new window will open displaying the results of the query.



File Edit View Favorites Tools Help

Back Search Favorites Media

DEDUCTION_TABLE

Download results in : Excel SpreadSheet CSV Text File (24 kb)

View All First 1 - 100 of 211 Last

	Priority	Plan Typ	Deductn Cd	Descr	Eff Date	Ded Class
1	190	10	P10101	Dakota Plan EPO	01/01/1901	N
2	190	10	P10102	Dakota Plan PPO/Basic	01/01/1901	N
3	190	10	P10103	Heart of America HMO	01/01/1901	N
4	190	10	P10103	Heart of America HMO	01/01/1901	A
5	190	10	P10106	Heart of America HMO - Flex	01/01/1901	N
6	190	10	P10106	Heart of America HMO - Flex	01/01/1901	B
7	190	1Z	P1Z101	EAP-Medcenter One	01/01/1901	N
8	190	1Z	P1Z102	EAP-St Alexius	01/01/1901	N
9	190	1Z	P1Z103	EAP-Village Family Services	01/01/1901	N
10	190	20	P20101	Basic Life Insurance	01/01/1901	T
11	190	20	P20101	Basic Life Insurance	01/01/1901	N
12	190	23	S23101	Highway Patrol Life & AD/D	01/01/1901	T
13	190	23	S23101	Highway Patrol Life & AD/D	01/01/1901	N
14	190	70	P70101	Highway Patrol Retirement Plan	01/01/1901	N
15	190	70	P70101	Highway Patrol Retirement Plan	01/01/1901	A
16	190	70	P70102	Judges Retirement System	01/01/1901	N
17	190	70	P70102	Judges Retirement System	01/01/1901	A

Note: You may download the results of a query to an Excel Spreadsheet, if needed, by clicking on the designated link.